Initial Assessment
How Do I Guide

Initial Assessment

Assessment

How Do I…?	Selections	Tips & Guidelines
Initiate assessment	▪ Click Create > Case Work > Assessment > Assessment. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Assessment/Report Link page, click the checkbox for the applicable PS Report(s). Click Continue. ▪ On the Assessment page, enter the applicable data/values.	*The initial assessment must be completed within the policy timeframes of a PS Report being linked to a case or used to create a case. An Assessment Due tickler will appear on the Ticklers tab before the due date. The tickler will be deleted once the supervisor approves the assessment.*
Link additional PS report to assessment	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ On the Participants tab, select Link Report to Assessment from the Options list. ▪ Click the checkbox for the appropriate CPS Report on the Assessment Report Link page. Click Continue. ▪ Click Save and click Close.	*A PS report can only be linked to a pending assessment (i.e., not completed approved assessments).*
View/update assessment	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ Enter the applicable data/values.	*This will allow you to continue working on an assessment that you have created, but not completed.*

Add participant to assessment	▪ On the Cases outliner, click on the case name link.
	▪ On the Maintain Case page/Participants tab, click the Insert button.
	▪ On the Search Person page, enter the applicable data/values and click the Search button.
	  ▫ For a match: Click the select link for the applicable person and click Continue.
	  ▫ For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Search page. Click the Create button and enter the applicable data/values on the Person Management page. Click Save > Click Close.
	
	Note: Once the search activity is completed and the participant is added to the case, click the Insert button on the Assessment page/ Participants tab to select/add the participant.
		After completing the Person Management page to create the record for a new participant, you will be returned to the Search Person page to complete the search. Click Continue to return to the Participants tab.
		
		If a person is part of an intake, but his/her name is unknown, when entering the intake, log the first and/or last name as "unknown". Be sure to update the correct Unknown, Unknown person record as additional information about the person is learned.

IA-Primary Caregivers

How Do I…?	Selections	Tips & Guidelines
Document allegation of abuse/neglect by primary caregiver	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ On the Basic tab, click the Options list > IA Primary Caregivers. Click Go. ▪ On the Initial Assessment-Primary Caregivers page, enter the applicable data/values.	*Click the IAPC Completed checkbox on the Initial Assessment-Primary Caregivers page to complete the IA-PC. <u>This checkbox must be selected in order to approve the assessment.</u>*
Document initial face-to-face contact	▪ Click Create > Case Work > Assessment > Initial Face to Face Contact. ▪ Click the appropriate case. Click appropriate participant. ▪ Click the Create button. ▪ On the Case Notes page, enter date occurred, and enter the case note. ▪ Scroll down to the Assessment Contact Information group box, select the appropriate begin date of the pending assessment from the drop-down list in the Begin Date field and enter the assessment contact information. Click Save > Click Close.	*A case note item documenting the initial face-to-face contact will appear under the Assessment subject on your Cases expando.* *The Assessment page must be created and pending in order for an assessment begin date to appear in the Assessment Contact Information Group Box.*

Document an assessment contact (other than initial face-to-face contact)	▪ Click Create > Case Work > Assessment > Assessment Contact. ▪ Click the appropriate case and/or case participant. ▪ Click the Create button. ▪ On the Case Notes page, enter date occurred and enter the case note. ▪ Scroll down to the Assessment Contact Information group box, click the appropriate begin date of the pending assessment from the drop-down list in the Begin Date field and enter the assessment contact information. Click Save > Click Close.	*A case note item documenting the assessment contact will appear under the Assessment icon on your Cases outliner.* *Assessment contact information entered on the Case Notes page will also appear on the Assessment page/Contacts tab.*
Determine safety/ risk (primary caregiver alleged maltreater)	▪ On the Cases outliner, click appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ On the Basic tab, click the Options list > IA Primary Caregivers. Click Go. ▪ On the Initial Assessment-Primary Caregivers page, enter the applicable data /values. *Note: Safety Assessments created through completion of the Initial Assessment – Primary Caregiver, are saved as separate items, under the Safety Assessment icon on the desktop outliner.*	*On the IA-Primary Caregivers page, there are four of eight tabs where you must record risk and safety information concerning maltreatment, child functioning, adult functioning, and parenting practices. You must complete each tab, the associated risks and safety questions before you can save the information.*
Complete initial assessment	▪ On the Assessment page/Results tab, Select IA Checklist from Options list. Click Go. ▪ Click applicable IA Checklist/check boxes. Click Save/Close. ▪ On the Assessment page/Participants tab, select Approval from Options list. Click Go Button. ▪ Select Approve on Approval History page. Click Continue. ▪ Click Save and Close on Assessment page.	*The Initial Assessment - Primary Caregivers template may be accessed from the IA-Primary Caregivers page by selecting IA Primary Caregivers from Options list and clicking Go.* *<u>The IAPC Completed checkbox on the IA-Primary Caregivers page must be checked to approve the assessment.</u>* *Before you can submit the initial assessment for approval, you must enter the disposition for each allegation on the Allegations tab of the Assessment page. If multiple allegations exist, a scroll bar will display allowing you to scroll down to view each allegation. If any of the allegations are substantiated, the status of the Assessment will be considered to be substantiated.*

Secondary/Non Caregivers

How Do I…?	Selections	Tips & Guidelines
Document allegation of abuse/neglect by secondary/ non-caregiver	▪ On the Cases outliner, click appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ On the Basic tab, click the Options list > IA Secondary/Non Caregivers. Click Go button ▪ On the Initial Assessment-Secondary/Non-Caregivers page, enter the applicable data/values.	
Complete initial assessment	▪ On the Assessment page/Results tab, Select IA Checklist from Options list. ▪ Click applicable IA Checklist/check boxes. Click Save/Close. ▪ On the Assessment page/Participants tab, select Approval from Options list. Click Go Button. ▪ Select Approve on Approval History page. Click Continue. ▪ Click Save and Close on Assessment page.	*The Initial Assessment – Secondary/ Non Caregivers template may be accessed from the IA-Secondary/Non-Caregivers page/Summary tab by selecting IA Secondary/Noncaregivers from Options list and clicking Go.*

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Plans

Safety Analysis and Plan

How Do I…?	Selections	Tips & Guidelines
Establish safety analysis and plan	▪ Click Create > Case Work > Planning > Safety Analysis and Plan. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Safety Analysis and Plan page, enter the applicable data/values.	*Use Insert button or Delete link to add/remove services on Safety Services tab.*

Update in-home services provider information	▪ On the Safety Services tab, complete the Service Category information.
	▪ Click the Search link to find a provider.
	▪ On the Provider Search Organization page, enter the applicable data/values and click the Search button.
	  ▪ For a match: Click the applicable provider radio button and click Continue.
	  ▪ For no match: Click the Close button and complete the Other Provider field on the Safety Services tab.	

Update/complete safety analysis and plan	▪ On the Cases outliner, click appropriate Case icon. ▪ Click Planning icon> pending Safety Analysis and Plan link. ▪ On the Safety Analysis and Plan page, enter the applicable data/values. ▪ On the Family Conditions tab, select Approval from Options list. Click Save and click Close.	*The Safety Analysis and Plan template may be accessed via the Safety Services tab by selecting Safety Analysis Plan from Options list.*

Out of Home Safety Plan

How Do I…?	Selections	Tips & Guidelines
Establish out of home safety plan	▪ Click Create > Case Work > Planning > Out of Home Safety Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Out of Home Safety Plan page, enter the applicable data/values.	
Add new placement information	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning icon > pending out of home safety plan link. ▪ On the Placement tab, enter the applicable data/values. ▪ Click the Search link. ▪ On the Provider Search page, enter the applicable data/values and click the Search button. ▪ Click the provider and click Continue.	*The ICWA Placement Provider Options box on the Placement tab contains five questions related to the placement of a Native American Indian child.*
Update/complete out of home safety plan	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning > pending out of home safety plan link. ▪ On the Out of Home Safety Plan page, enter the applicable data/values. ▪ Select Approval from Options list, Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	*The Out of Home Safety Plan template may be accessed via the Placement tab by clicking the Text button.*
Terminate out of home safety plan	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning icon> ongoing out of home safety plan link. ▪ On the Out of Home Safety Plan page/ Jurisdiction tab, select Terminate from Options list. Click Go. ▪ On the Terminate Plan page, enter the applicable data/values. ▪ Select Approval from Options list, Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	*Only an approved ongoing Out of Home Safety Plan can be terminated.*

Visiting Plan

How Do I…?	Selections	Tips & Guidelines
Complete visiting plan	▪ Click Create > Case Work > Planning > Visiting Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Forms page, select Visiting Plan from Options list. Click Go button. ▪ On the Visiting Plan template, enter the applicable data/values. ▪ Click Close Document and Return to eWiSACWIS. ▪ Click Save and click Close.	

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